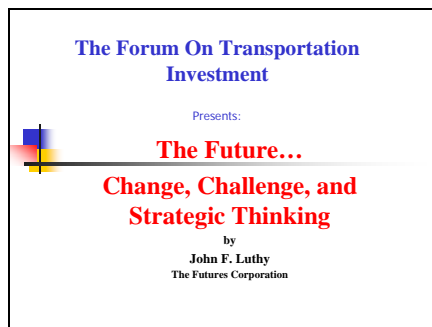


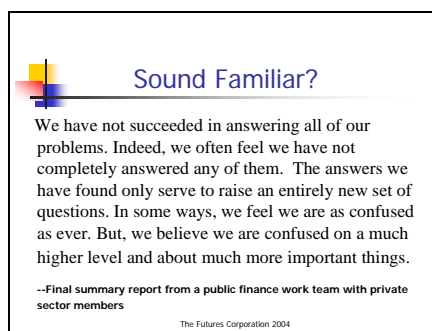
Slide 1



Thank you Dwight

As I look out over this group, I realize that this is a very seasoned group of people. Many of you have been in your career field for many years and you are very familiar with the challenges that you face. Much of the population information I will cover, you already know. Idaho has changed so much. Boise's population has grown from 81,000 to 200,000+.

Slide 2



Forums are convened to establish a 'think tank' of experienced people. A forum is also a good method to stretch our thoughts and to look over the horizon to our future. Current planners are now being asked to look out a hundred years. Maybe we don't have to consider that far out, but certainly 30-40 years is reasonable.

Slide 3




We will need to consider

“What vs. How”

“On vs. In”

Slide 4



The Situation...


- The world population will reach 9 billion by 2050...The World Population Data Sheet estimates the global population will rise 46 percent between 2003 and 2050
- The U.S. population is expected to grow 45 percent- to 422 million
- India will overtake China as the world's most populated country
- Many industrialized countries will grow slowly or not at all...up to 135 percent growth in poor nations.

The Futures Corporation 2004

India's population will be more than China.

Many poor nations are predicted to grow in population up to 135%.

Slide 5



Idaho's Population Growth

■ 1980	948,000
■ 1990	1,012,380
■ 2000	1,299,720
■ 2010	1,502,630
■ 2020	1,767,170
■ 2030	2,026,064

56% Growth 2000-2030- well above the national average

The Futures Corporation 2004

Idaho's population is predicted to have 56% growth by 2030.

Slide 6




Idaho's Population Growth

- Fourteen year expansion 1987-2001
- Population increased 2.1% a year – nearly twice the national average
- Real personal income averaged 4.3% growth- national average was 3%
- Population growth for next 15 years much slower, but predicted to be close to twice the national average

The Futures Corporation 2004

Next 15 years will continue to have twice the national average.

Slide 7




The Situation...

At the current pace, the physical public infrastructure in many areas of the United States is deteriorating 8-10% faster than it can be rebuilt. This may increase as funds become tighter.

Where does Idaho stand in overall infrastructure development?

The Futures Corporation 2004

Slide 8




The Situation...

- An estimated 25 percent of all bridges in the U.S. are deficient...163,010 according to Federal Highway Commission data
- Administration recommended \$247 billion...next 6 yrs (count on around \$265mm)
- House Transportation Committee chair Don Young asked for \$375 billion to assist states and local jurisdictions with roads and bridges

The Futures Corporation 2004

Slide 9




The Situation...

The latest figures indicate that it would cost more than \$500 billion to repair/renovate the road & bridge infrastructure in the United States. Worldwide, updating just this basic infrastructure would cost over \$5- \$10 trillion. Idaho figures range from \$3.2 billion to over \$8 billion through 2017

The Futures Corporation 2004

Slide 10



A simple plan...

**Men, I want you to fight vigorously and then run.
And, as I am a little bit lame, I'm going to start
running now.**

General George Stedman
U.S. Army (Civil War)

The Futures Corporation 2004

Slide 11



In Our Communities...

- Tight budgets and struggling economy causing reduced CIP and deferred maintenance
- 'Economic Chess' to attract business, tourism, development-- huge emphasis on investment and revenue generation
- Response to federal mandates – more 'hoops' & regulations



The Futures Corporation 2004

Slide 12




In Our Communities...

- Competition for finite resources- more difficult to balance needs of one community or multiple local communities
- Growing scrutiny, more demand, higher expectations, conflicting needs around social, physical & financial investment
- Greater need for consolidation, partnerships, and collaborative thinking

The Futures Corporation 2004

Slide 13



Population Growth – Where and Why??

- Peace, harmony, & quality of life
- Expenses are lower – better economic value
- Good schools, conservative government
- Available and highly capable workforce
- Business operations can be more isolated
- Sense of community & community values

The Futures Corporation 2004

Why is Idaho growing? We have a better place to live.

Slide 14




Population Growth – Why??

- Escape from large metro areas
- Promise of a better, safer life
- Stronger, more stable economic base
- Potential for more opportunity
- Great environment, great people
- Superb recreation
- Climate

The Futures Corporation 2004

Slide 15




Transportation Stress Areas Based on Growth in Idaho's Key Geographic Areas

The Futures Corporation 2004

Unfortunately, Idaho's topographic limitations cause Idaho's population to be compressed into key geographic areas. Our river bottoms, mountain ranges, limit where most people will live.

Slide 16

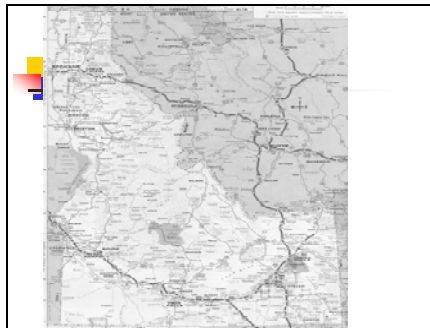


High Growth/Stress Regions


- **North Idaho**- Kootenai and Bonner
- **North Central**- Latah and Nez Perce
- **Central**- Valley County
- **West Central**- Gem, Washington, and Payette
- **Treasure Valley** – Canyon and Ada
- **South Central**- Blaine, Gooding, Lincoln, Jerome, and Twin Falls
- **Eastern Idaho**- Bonneville and Bannock

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Slide 17



Slide 18




Major Stress Areas – 20 Yr Increments

North Idaho – Kootenai & Bonner

<u>Year</u>	<u>Population</u>	<u>% Growth</u>
1970	51,200	
1990	97,170	90%
2010	185,270	91%
2030	273,160	48%

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Slide 19



Major Stress Areas – 20 Yr Increments


North Idaho – Kootenai

<u>Year</u>	<u>Population</u>	<u>% Growth</u>
1970	35,600	
1990	70,400	98%
2010	140,000	99%
2030	209,000	50%

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The Spokane/Coeur d' Alene area will see phenomenal growth. Population will double by 2010, with another 50% by 2030.

Slide 20



Major Stress Areas – 20 Yr Increments


North Idaho – Bonner

<u>Year</u>	<u>Population</u>	<u>% Growth</u>
1970	15,600	
1990	26,770	72%
2010	45,270	70%
2030	64,160	42%

The Futures Corporation 2004

The Sandpoint area is also growing and crowding into limited corridor areas.

Slide 21



Major Stress Areas – 20 Yr Increments


North Idaho – Shoshone

<u>Year</u>	<u>Population</u>	<u>% Growth</u>
1970	19,700	
1990	14,000	-25%
2010	12,400	-12%
2030	8,200	-34%

The Futures Corporation 2004

Some counties are predicted to experience negative growth for one reason or another.


Slide 22



North Central- Latah and Nez Perce		
Year	Population	% Growth
1970	55,600	
1990	64,600	17%
2010	77,360	20%
2030	92,200	20%

The Futures Corporation 2004

Slide 23




West Central- Washington, Payette, and Gem		
Year	Population	% Growth
1970	29,500	
1990	36,900	25%
2010	52,000	41%
2030	67,000	29%

The Futures Corporation 2004

West Central counties may experience even more growth if current population shifts continue.

Slide 24




Central – Valley County		
Year	Population	% Growth
1970	3,600	
1990	6,140	71%
2010	*8,870	45%
2030	*12,550	42%

* Some feel this is low based on recent trends

The Futures Corporation 2004

Population growth prediction may be low if resort and accompanying residential investment is made.

Slide 25




Major Stress Areas – 20 Yr Increments		
Treasure Valley (Ada & Canyon)		
Year	Population	% Growth
> 1970	175,000	
> 1990	297,600	70%
> 2010	545,000	177%
> 2030	761,000	40%

The Futures Corporation 2004

Treasure Valley is another area where predictions could be low. Many factors can affect the final number, but major growth should be expected in the near future.

Slide 26




Major Stress Areas – 20 Yr Increments		
Canyon County		
Year	Population	% Growth
> 1970	62,000	
> 1990	90,600	46%
> 2010	162,000	80%
> 2030	210,000	30%

The Futures Corporation 2004

Canyon county predictions could be much higher if development continues. A new Wal-Mart can change population growth.


Slide 27



Major Stress Areas – 20 Yr Increments		
Ada County		
Year	Population	% Growth
> 1970	113,000	
> 1990	207,000	84%
> 2010	383,000	85%
> 2030	551,000	44%

The Futures Corporation 2004


Slide 28



South Central – Blaine, Lincoln, Jerome, Twin Falls, & Gooding Counties		
<u>Year</u>	<u>Population</u>	<u>% Growth</u>
1970	70,100	
1990	97,900	40%
2010	138,400	42%
2030	180,100	31%

The Futures Corporation 2004

Slide 29




Blaine County		
<u>Year</u>	<u>Population</u>	<u>% Growth</u>
➤ 1970	5,800	
➤ 1990	13,800	138%
➤ 2010	26,300	91%
➤ 2030	41,800	59%

The Futures Corporation 2004

Blaine county by itself is a very interesting growth area. The population will remain compressed into narrow land areas that will have inflated costs.


Slide 30



Eastern Idaho - Bonneville & Bannock		
<u>Year</u>	<u>Population</u>	<u>% Growth</u>
1970	104,900	
1990	138,900	33%
2010	180,400	30%
2030	233,600	30%

The Futures Corporation 2004


Slide 31



Major Stress Areas – 20 Yr Increments		
Bonneville County Growth		
Year	Population	% Growth
1970	52,500	
1990	72,600	39%
2010	96,900	34%
2030	128,700	33%

The Futures Corporation 2004

Slide 32




Major Stress Areas – 20 Yr Increments		
Bannock County Growth		
Year	Population	% Growth
1970	52,400	
1990	66,260	27%
2010	83,470	26%
2030	104,900	26%

The Futures Corporation 2004

So you see that Idaho has stress areas throughout the state.

Additionally, our industry/economy (high-tech, service, tourism, timber and agriculture) will support an influx of in-migration. And as our airports grow, economic growth will become that much stronger.

Slide 33




Assessing Challenges...	
What VS. How	
On VS. In	

The Futures Corporation 2004

Idaho also is a “bridge state,” so some of our transportation problems are driven by the need to cross through.

Every time we improve up north, we make Canadian growth easier -- good roads assist Canadian exports to move to market.

Slide 34



The Road Ahead...


Launch inquiry, conduct analysis, define challenges, 'frame' your agenda, establish clear direction and a course of action, explore new options, define a time line, and recommend a sensible set of strategies that allow adequate funding for key projects

The Futures Corporation 2004

Another problem that will impact Western population growth is water. The west has had high precipitation in the last few decades, but the pendulum is swinging to a much drier time. Water is finite and it will get scarce. Lake Mead and other Arizona watersheds are already well below normal.

Major climatic shifts can occur in ten years. A book – *Two Mile Time Machine* – deals with the melting ice cap and the climatic changes that may happen.

Slide 35



Some Practical Questions...


With several billion dollars needing to be invested in Idaho's transportation infrastructure over the next fifteen to twenty years, how should the state plan for such long-term – and very predictable- funding requirements? Will the same old approaches suffice or are their other proven approaches that can ensure continuous improvement? What mechanisms can be created and what actions must be taken?

The Futures Corporation 2004

U. S. exports in meat products are doing better, while exports of grain are not competing as well with foreign growers. So U. S. is switching to feeding grain here and then exporting meat. This is a very smart way to compete.

Transportation systems are going to have to be allied with producers to define the smartest way to match their needs.

Slide 36




Some Practical Questions...

What criteria might be used for establishing project and funding priorities? Similarly, how will the State effectively make plans now that will relate to predictable surface transportation needs for the next 25 years? Think multi-modal, light rail, highway, roadway, and public transit...

The Futures Corporation 2004

Logistics in transportation is key to import/export competitiveness; and transportation planning will have to address this issue.

Slide 37




Some Practical Questions...

Finally, based on supportable fact and predictable reality...

- What should be done...or what can be done?
- Where must it be done?
- When should actions occur? Is there a sequence?
- And, how do we ensure a realistic opportunity to succeed so we leave a legacy for those who follow?

The Futures Corporation 2004

Slide 38



Remember, You Cannot...

- Control the pace of change
- Fail to abandon the expendable & archaic
- Avoid the obvious (predictable surprise)
- Express fear of the future
- Try to eliminate uncertainty

The Futures Corporation 2004

Thanks for inviting me to speak to these important issues.

Questions & Considerations

Presented by The Futures Corporation on 9/27/04 @ Boise, Idaho

John Luthy, President

As noted in the presentation, this esteemed group is in many ways a 'think tank' convened to consider not only transportation planning for the next 25 years, but also how the various programs and services you envision might be funded. In this venue, you are encouraged to become extraordinary strategic thinkers, leaving existing roles and representation at the door. Today and in the months ahead, you are a thinking citizen of our great state and are challenged to leave the best possible legacy for those who follow.

Over the coming months, consider the following questions. You will raise many more as you drill down into this very interesting, very challenging subject, but these will help get you started.

- ☐ What will the nature of traffic be in 2020? 2030? Where will it be most significant? Will traffic growth and congestion be key motivators for both funding and planning?

- ❑ Trend analysis indicates that long-haul truck size will continue to increase. What will this do to road planning – new and maintenance programs? Will trucking be more of a critical planning factor than passenger cars? Should it be?
- ❑ Passenger vehicle size is predicted to decrease over the next twenty years as gasoline, maintenance costs, and prices soar. How will smaller cars impact transportation planning and road maintenance?
- ❑ How will combined effects of larger transport trucks and smaller cars be factored into the planning and funding equation?
- ❑ Alternate fuels will become very prominent within ten years. Yet, there is currently no mechanism to track usage or tax alternative fuels such as hydrogen or electricity. As gasoline is used less (due to elective migration to other fuels or shortages) and new alternatives are found, how will road maintenance be funded, given that vehicle will continue to use the roadways?
- ❑ Historically, ITD has done a great job of linking metropolitan areas within a very rural state. Will this thinking and application of funds evolve as the population grows and more urbanization occurs? What type of collaboration will be necessary? Will funding mechanism evolve?
- ❑ Urban metro areas are quickly becoming magnets for commuting workers, bringing greater stress on roadways linking more rural areas/communities to more urban communities. Commuter demand is predicted to intensify and grow significantly in specific areas. Due to economic realities related to business growth options in Idaho communities, should roadway funding be tied to predicted or desired economic development? How can it be?
- ❑ Land use planning will grow much more interrelated with transportation planning over the next several years – it is already a significant element. How will economic development planning, land use planning, and transportation planning be integrated? Are there existing mechanisms or must they be created? Who leads this effort?
- ❑ With several billion dollars needing to be invested in Idaho's transportation infrastructure over the next ten to fifteen years, how should the state plan for such long-term – and very predictable – funding requirements? Will the same old approaches suffice or are there other proven approaches that can ensure continuous improvement? What mechanisms can we put in place and what actions must be taken?
- ❑ What criteria might be used for establishing project and funding priorities? Similarly, how will the State effectively make plans now that will relate to predictable surface transportation needs for the next 25 years? Think multi-modal, light rail, highway and roadway, and public transit...
- ❑ And finally, based on supportable fact and predictable reality...
 - ⇒ What should be done;
 - ⇒ Where must it be done;
 - ⇒ When should actions be complete;
 - ⇒ And, how do we ensure a realistic opportunity to succeed?